

Document Management Questionnaire

Company Name: _____ Contact: _____

Contact Phone: _____ E-mail: _____

Document Questions:

Briefly describe the documents to be processed and related business processes.

What are the major classifications of the documents?

How are the documents stored?

What is/are the paper size(s) of the documents?

Age of Documents by percentage

More than 10 Years _____

5 to 10 Years _____

Less than 5 Years _____

Are the documents structured and repetitive? An example would be an "internal" document, such as, a "signed" proof of delivery or a packing slip with hand written notes.

Are the documents single sided (simplex); double sided (duplex) or both?

Are the documents single page or multi-page or both?

If multi-page, is the first page a "control" page with "control" data?

If single page, is there "control" data on each? (ex: Invoice #)

How many documents, per day, to process for this application?

How many documents (in total, estimate) could the repository contain?

What is the preferred method of document separation, if required? (bar code, blank page, on line, other)

Are the documents stored in a single location? Give the details of the location(s)

Do you want us to set the project lab in your location(s)?

Quality and type of documents?

For example dot matrix, laser, black and white, color, size etc.

Is there a bar code printed on any documents?

How many documents per day / week / month?

Briefly describe security requirements:

Number of users requiring retrieval _____

Functional requirements questions:

Do you require "Version Control" (ability to finalize documents)?	Y	N	
Do you require workflow (routing of documents to individuals or groups)?	Y	N	
Do you require document annotations, redaction, stamps, etc.?	Y	N	
Do you require voice over image technology?	Y	N	
Do you require a document/user audit log of viewing, saving, printing, faxing, emailing, etc.?	Y	N	
Do you require "zone" OCR (selected areas converted to text)?	Y	N	
Do you require "batch" processing of documents?	Y	N	
Do you require document conversion from existing files/documents?	Y	N	
Do you intend to scan historic documents (back filing)? (Or start with new documents only) If Yes, approximate number of documents (ball park): _____	Y	N	
Do you prefer a "Client/server" or "Web based" document management solution?	C	W	
Do you have a "Server" based platform/repository or a Workgroup (peer to peer)?	S	W	
Do you prefer "Windows" login security or a Proprietary login?	W	P	
Do you intend to scan from a "Central" location or "Desktops" or both?	C	D	B
Do you currently own the required scanning equipment? If Yes provide device details: _____	Y	N	

Organization Structure

Please provide a brief overview of your organization structure

Number of Companies _____

Number of Departments _____ (Each Company)

Number of Users per department _____

Retrieval Questions:

What criteria will be used to retrieve your documents? Circle all that apply.	Y	N
Windows (explorer type) navigation	Y	N
Database (backend) inquiry	Y	N
Full Content (every word)	Y	N
Search by indexing data only	Y	N
Restricted by security levels	Y	N

Implementation Time-Frame: Please circle that which best applies to your goal

ASAP	60 days	90 days	6 months	One Year
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Additional Information:

Please provide relevant sample documents:

Thank you.